SANDATA ELECTRONIC VISIT VERIFICATION (EVV): SECURITY (USER SET-UP)

OBJECTIVES

After completing this lesson, you will be able to:

- define key terminology;
- access the security module;
- create and manage users
- create and manage user roles; and
- change your password.

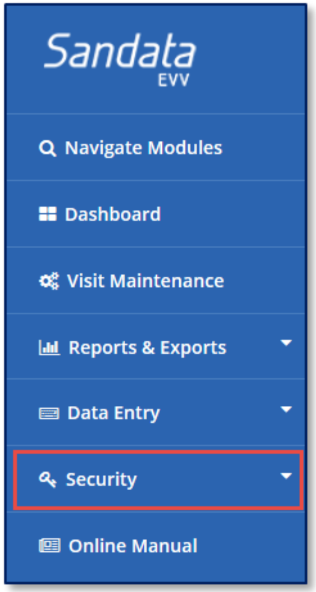
KEY TERMINOLOGY

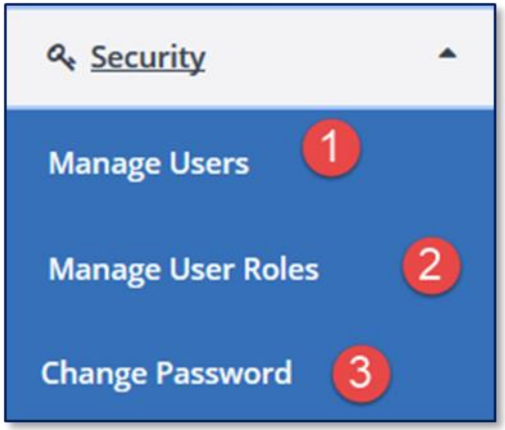
Term	Definition
Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords.
Client	A person who receives services through the Medicaid program.
Privilege	A single permission.
Role	A group of privileges (permissions) assigned to the user which allows the user to perform visit activities in Sandata EVV.
Security	The module in Sandata EVV where users (office staff) are set up to use the system.
User	A person with a unique login and password to Sandata EVV.
Username	The user's email address.

SECURITY SETTINGS: ACCESS

- Click Security from the main navigation panel.
  - Expands to display 3 sections of security settings

1. **Manage Users** – allows the user to create and maintain users.
2. **Manage User Roles** – allows the system administrator to group privileges and assign them to users of the EVV system
3. **Change Password** – allows the logged in user to change their own password

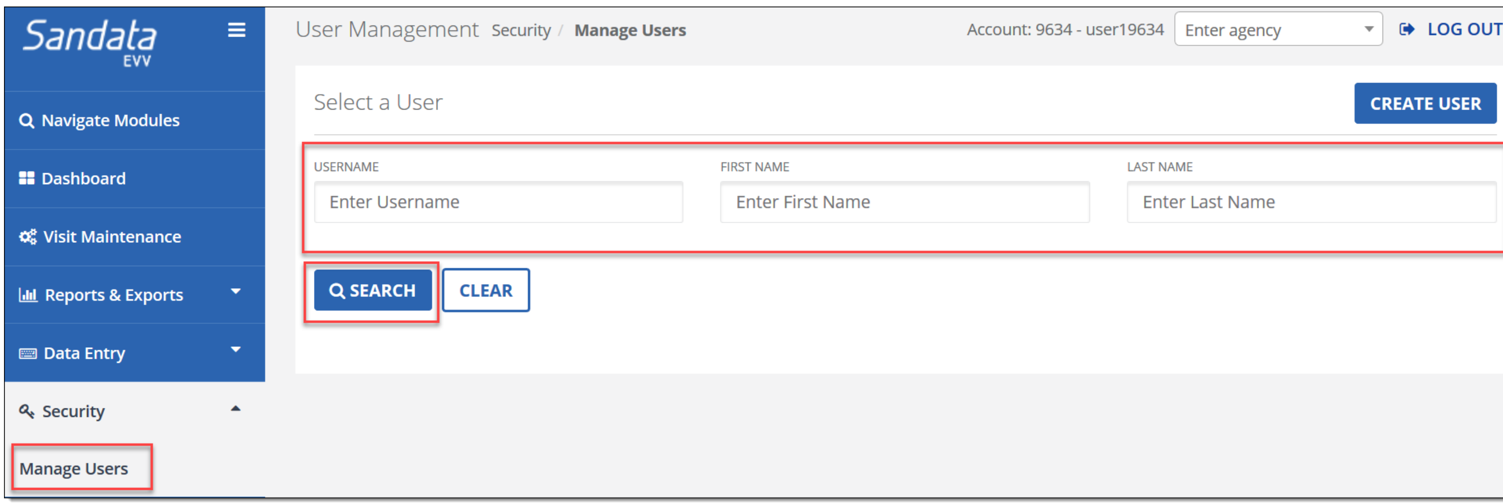




SEARCHING FOR USERS

SEARCHING FOR USERS

1. Click **SECURITY** > **MANAGE USERS**
2. Input the appropriate criteria (user name, first name or their last name) in the appropriate fields to filter the results.
3. Press <**Enter**> (on the keyboard) or click **SEARCH**.

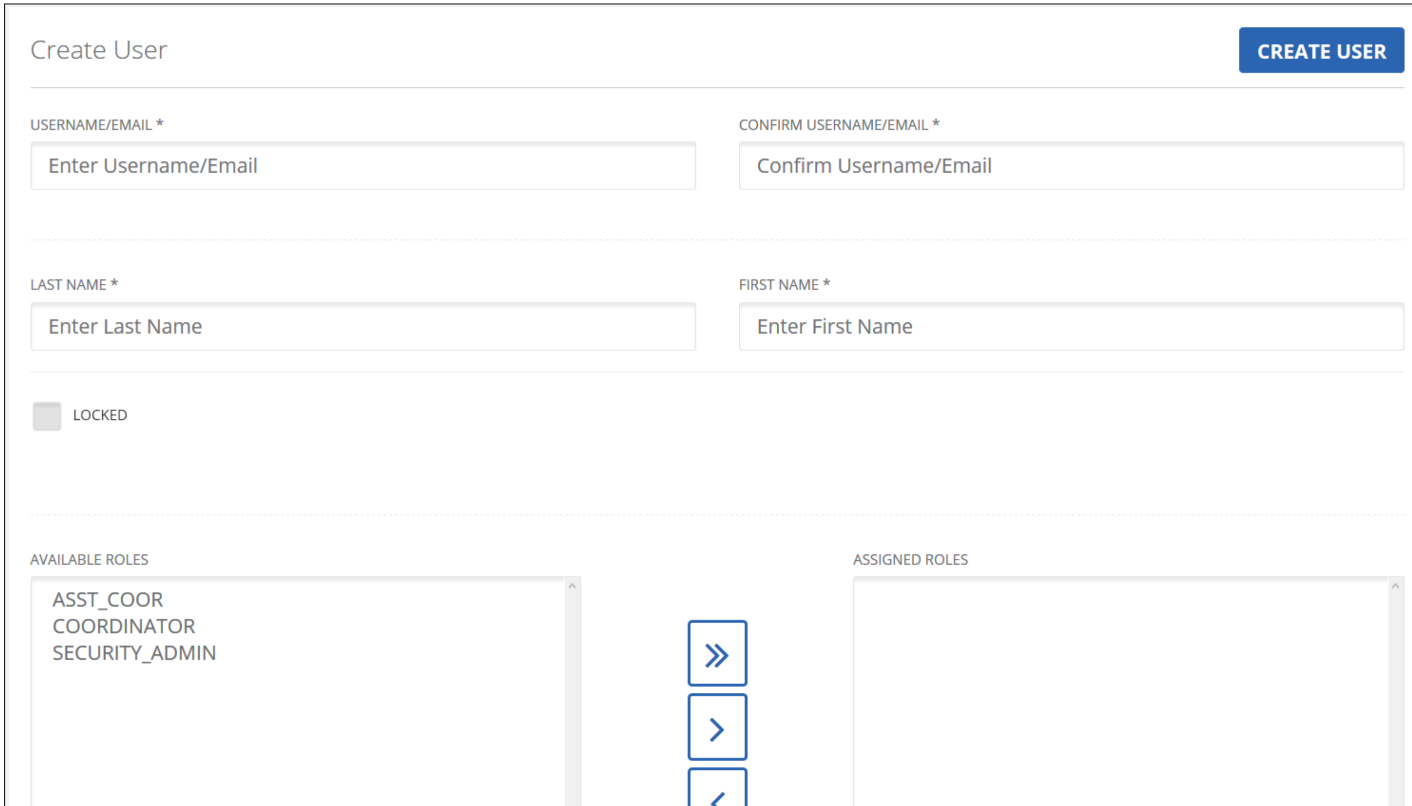


Username	Account Status	First Name	Last Name	Actions
[illegible]	OPEN	[illegible]	[illegible]	

CREATE A NEW USER

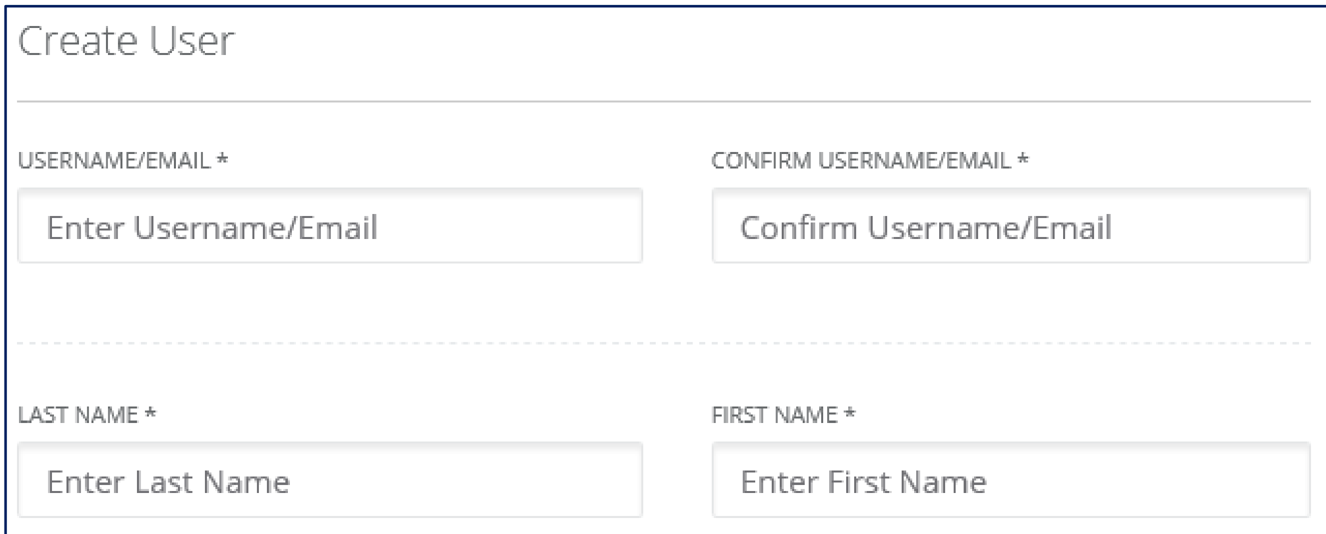
CREATE A NEW USER

1. Click **SECURITY** > **MANAGE USERS**
2. Click **CREATE USER**. The *Create User* screen opens.



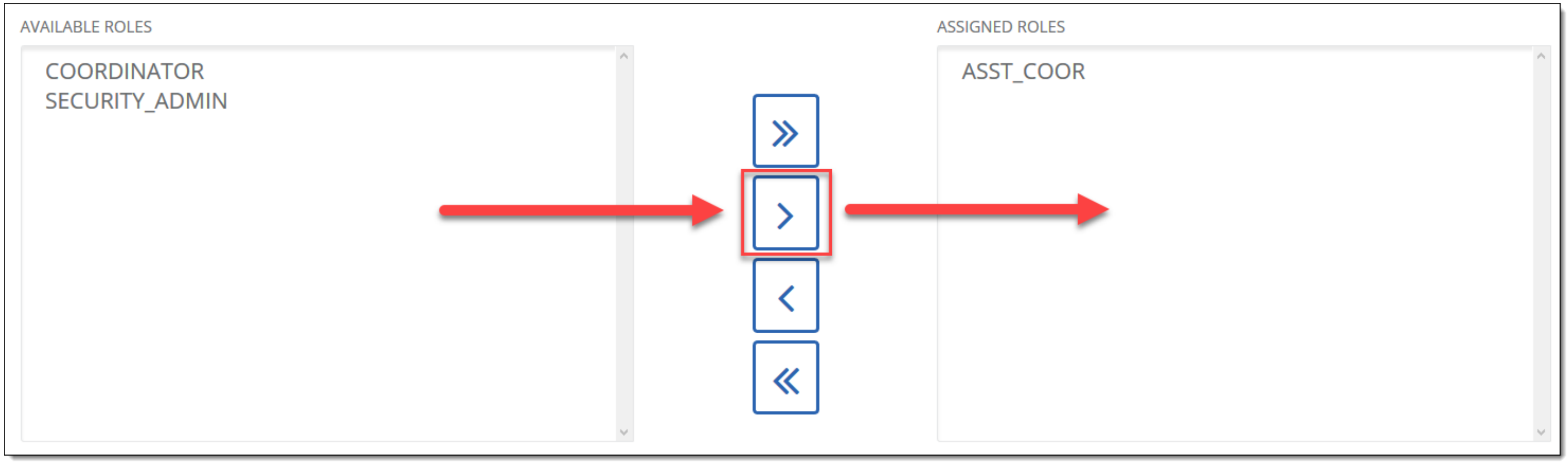
CREATE A NEW USER

2. Enter/Confirm the user's email address and their **LAST NAME** and **FIRST NAME**.



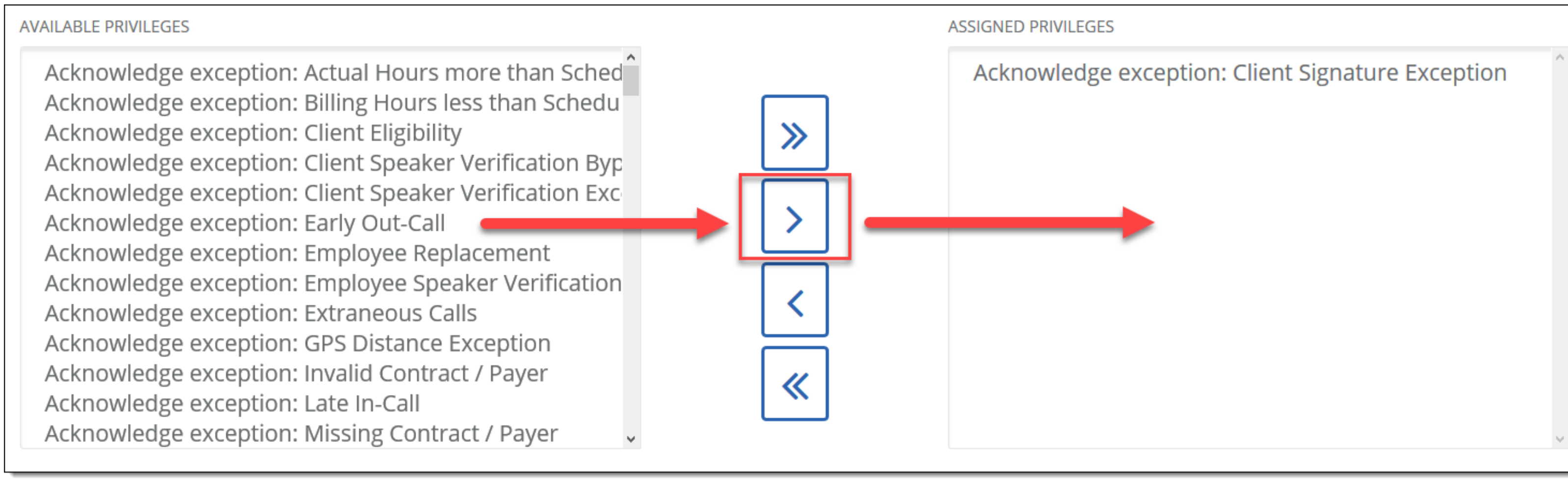
CREATE A NEW USER

3. Click the appropriate item in the **AVAILABLE ROLES** field and click the > button to move it into the **ASSIGNED ROLES** field. All user privileges assigned to the roles selected are granted to the user. Multiple roles can assigned to a user, as necessary



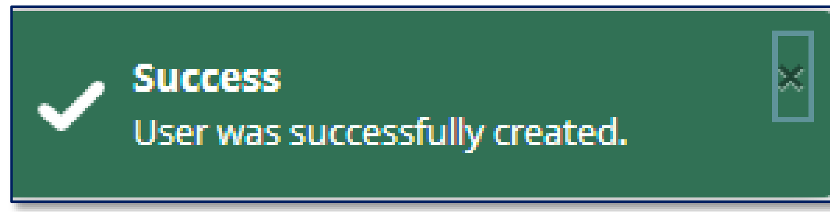
CREATE A NEW USER

4. Click the appropriate item in the **AVAILABLE PRIVILEGES** field and click the > button to move it into the **ASSIGNED PRIVILEGES** field.



CREATE A NEW USER

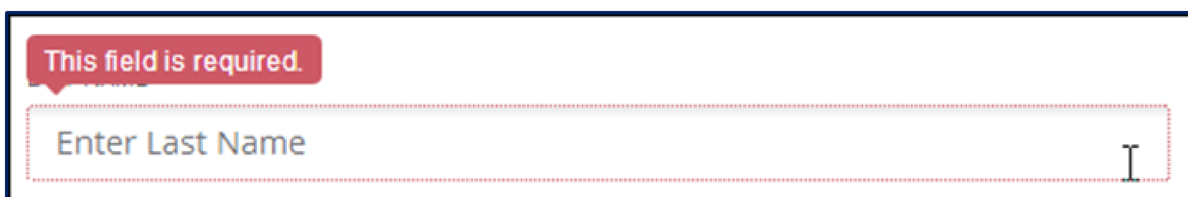
5. Click **CREATE USER**. A successful confirmation dialog displays.



If a user also provides care to a client, they must be added as an employee in Sandata EVV.

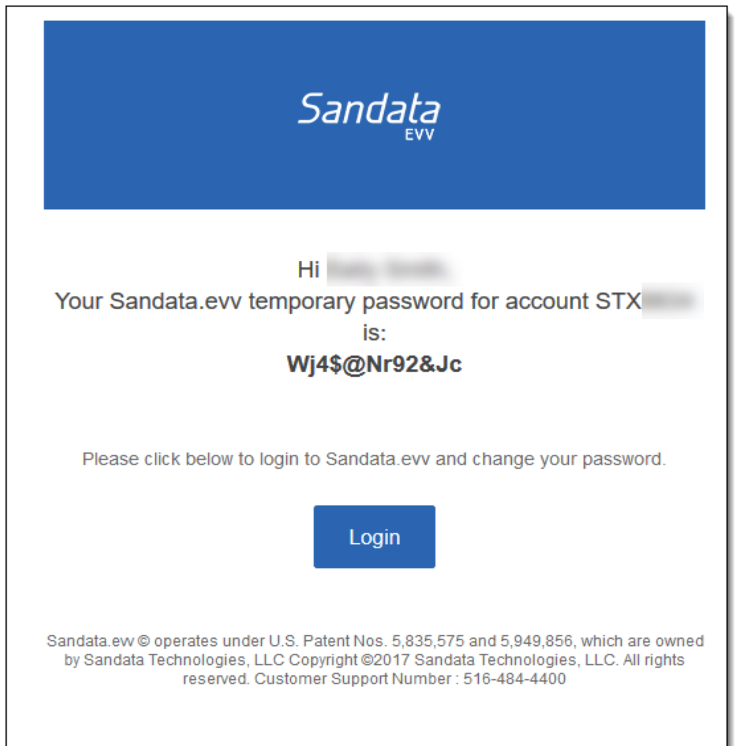
TIP

If any of the required fields are not filled out correctly or left blank, a tool tip message displays above the field to be completed.



CREATE A NEW USER

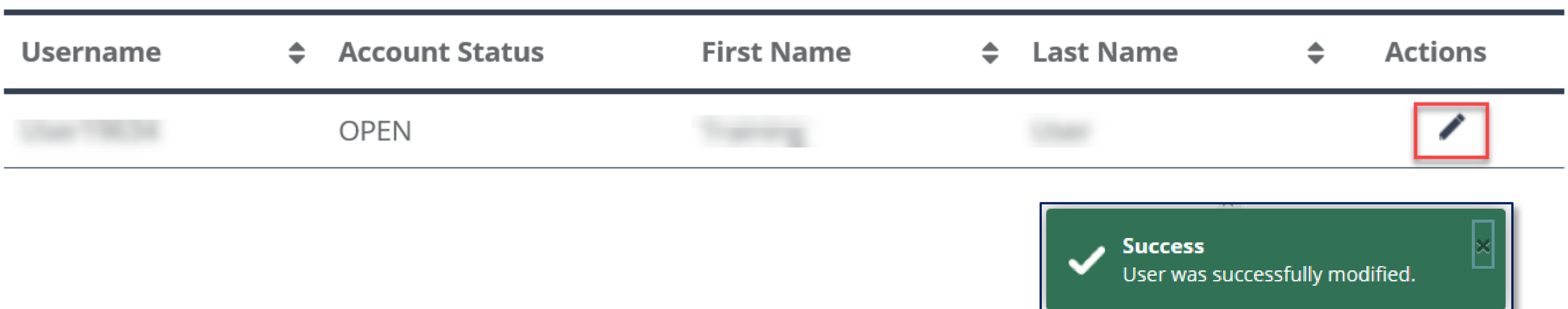
6. Sandata EVV will send a temporary password email to the email address entered during the user set up. The user can use the temporary password to login and set their permanent password.



MODIFY A USER

MODIFY A USER

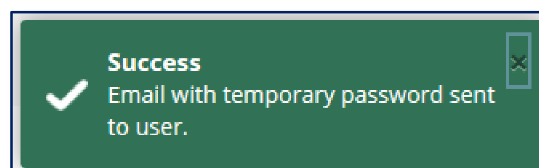
1. Perform a user search.
2. Click Edit in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Add/Remove any of the roles/privileges to modify the user account.
4. Click **MODIFY USER**. A successful confirmation message displays.



RESETTING A USER'S PASSWORD

RESETTING A USER'S PASSWORD

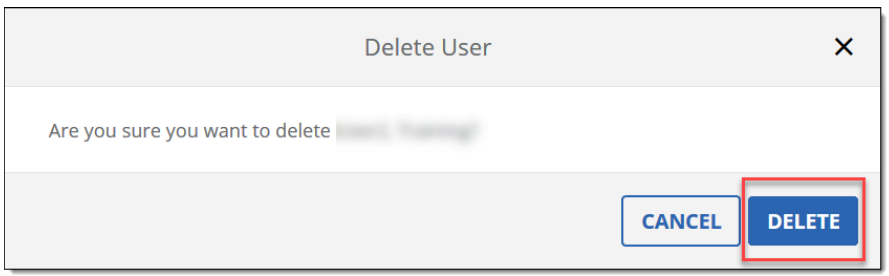
1. Perform a user search
2. Click Edit in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Click **RESET PASSWORD**. A message displays indicating a temporary password has been sent to the user.

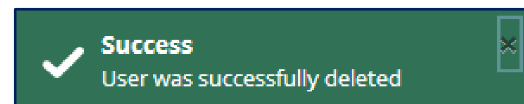


DELETING A USER

DELETING A USER

1. Perform a user search.
2. Click **DELETE** in the Actions column on the right-hand side of the screen of the appropriate user. The Delete User confirmation box displays.
3. Click **Delete**.





Remember that deleting does not remove the user from Sandata EVV, but inactivates the record.

MANAGE USER ROLES

MANAGE USER ROLES

- The use of roles allows Administrators to tailor a set of system functions for each job title in the organization to make maintenance of user access easier.
- Whenever a role is edited, it affects all users who have been assigned to that role.

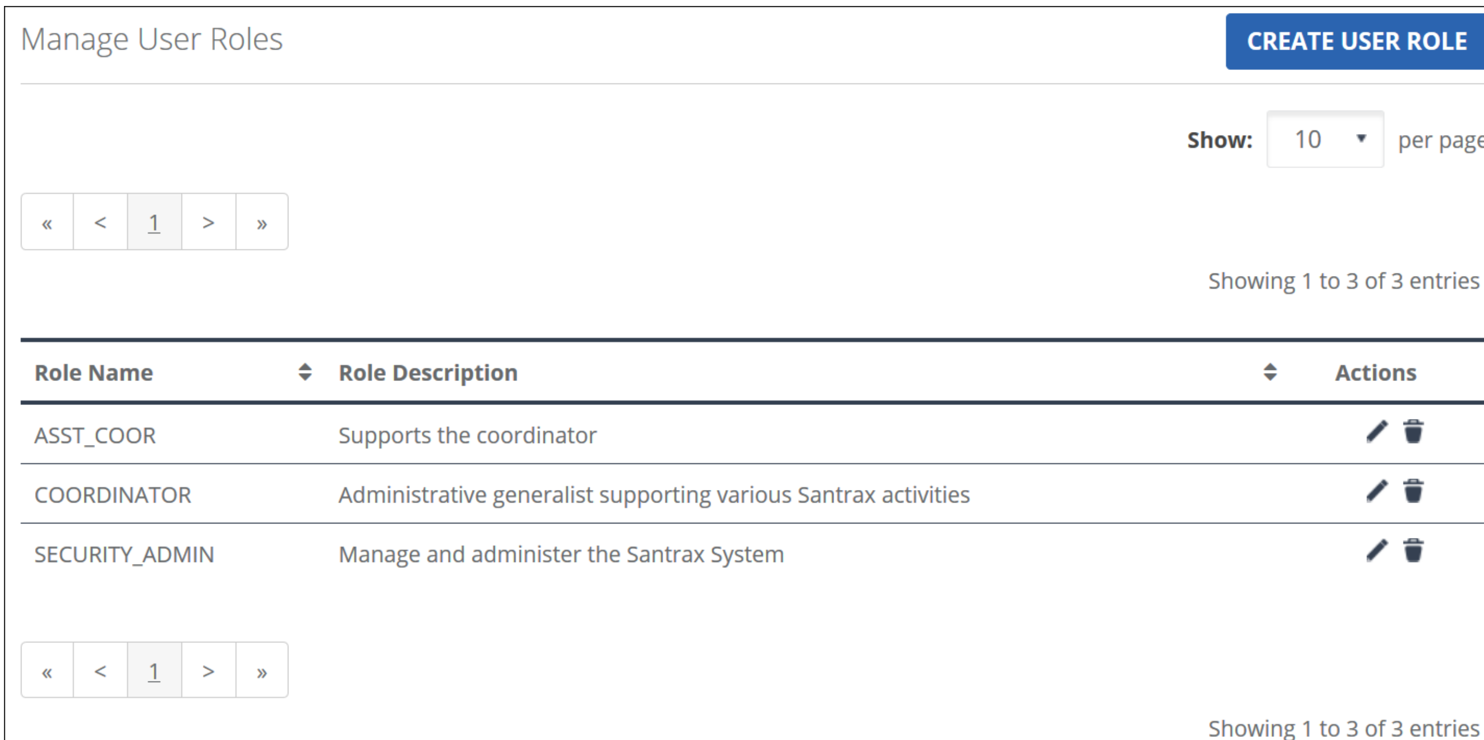
Sandata EVV includes a standard set of roles across all agencies. The roles are:

Default Role	Description
ASST_COOR (Assistant Coordinator)	Sandata EVV generalist that supports visit verification and visit reporting.
COORDINATOR	Intake/manage clients, intake/manage employees.
SECURITY_ADMIN	Agency set up, create and manage all EVV users.

CREATING NEW USER ROLE

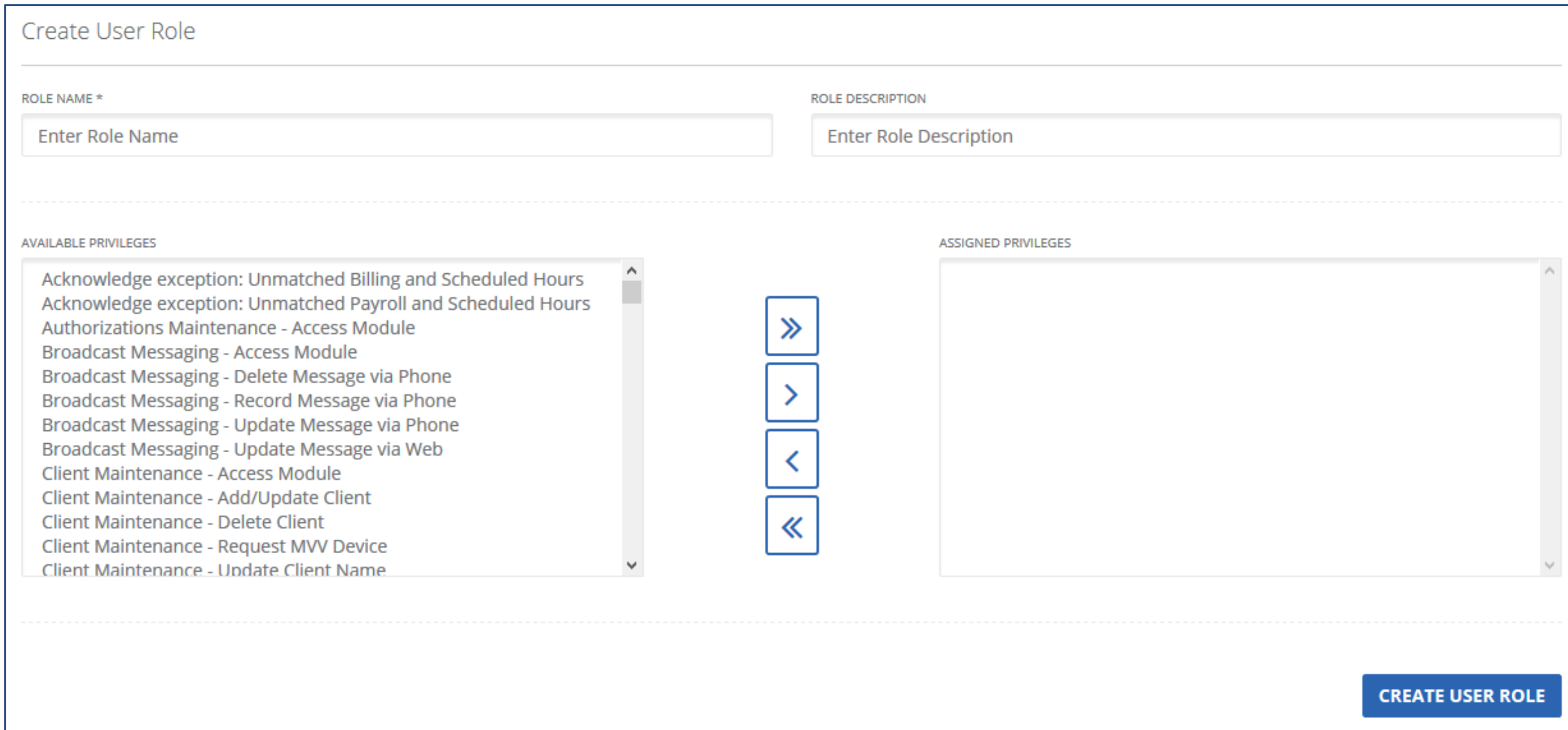
CREATING NEW USER ROLE

1. Click **SECURITY** > **MANAGE USER ROLES**. The *Manage User Roles* screen displays.



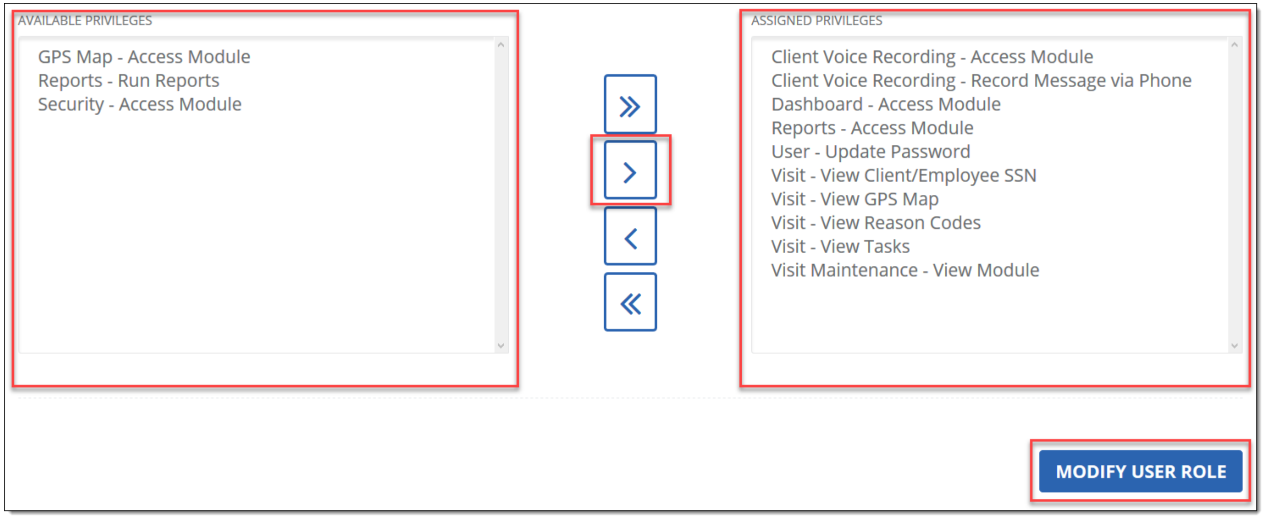
CREATING NEW USER ROLE

2. Click **CREATE USER ROLE**. The *Create User Role* screen opens.



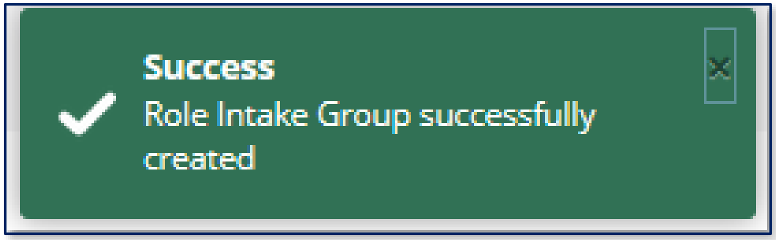
CREATING NEW USER ROLE

3. Enter the name for the new role in the **ROLE NAME** field.
4. Enter a brief description in the **ROLE DESCRIPTION** field.
5. Select the privilege(s) to be assigned to the new role in the **AVAILABLE PRIVILEGES** field.



CREATING NEW USER ROLE

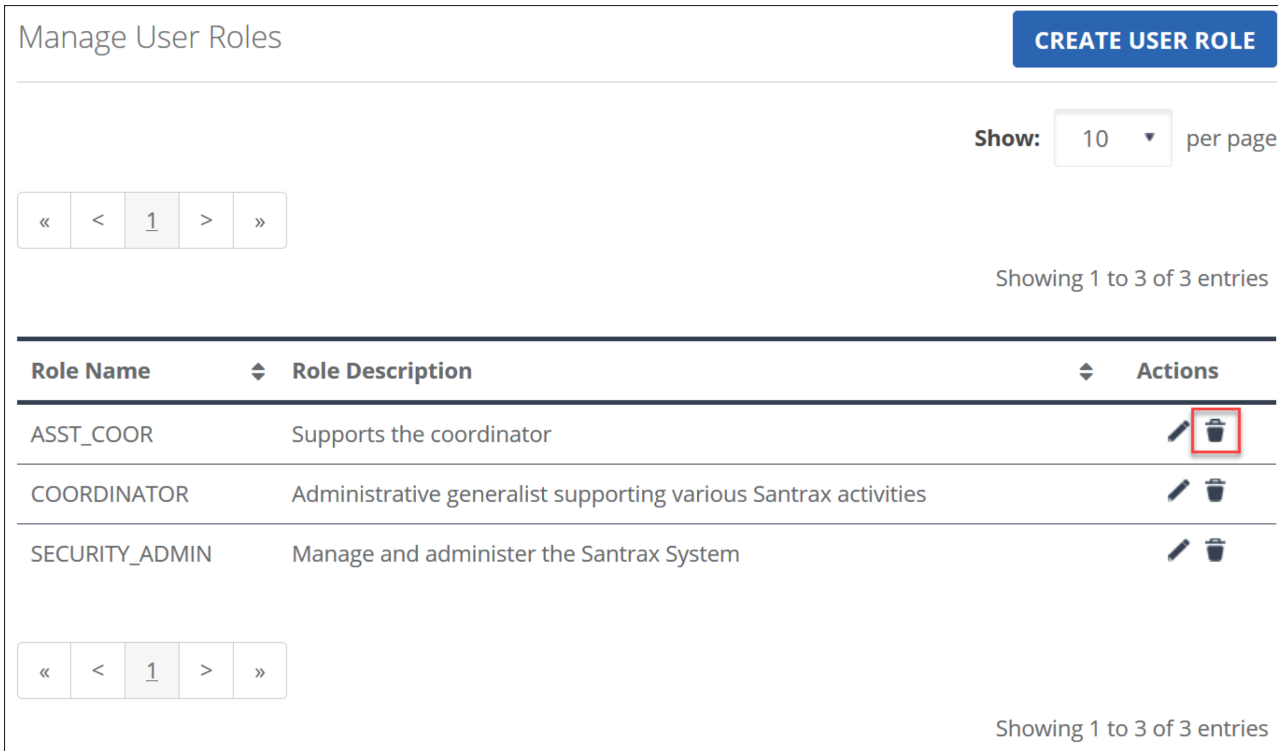
6. Click **CREATE USER ROLE**. A successful confirmation message displays.



DELETING ROLES

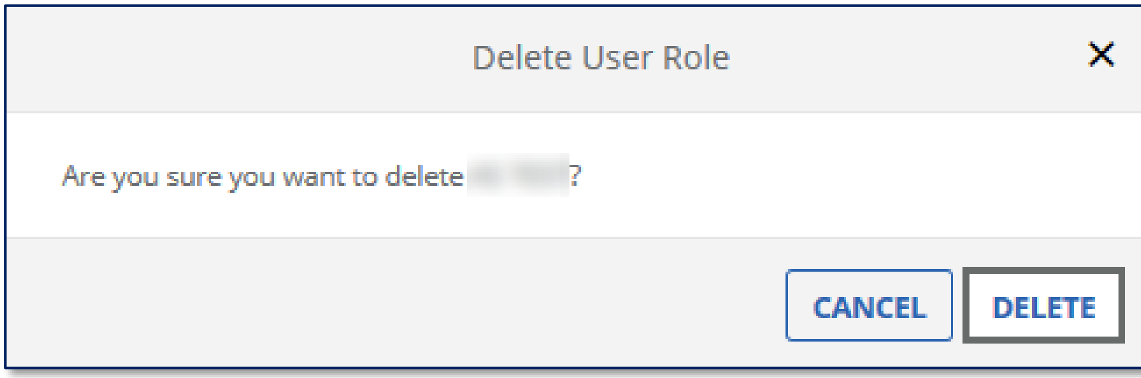
DELETING ROLES

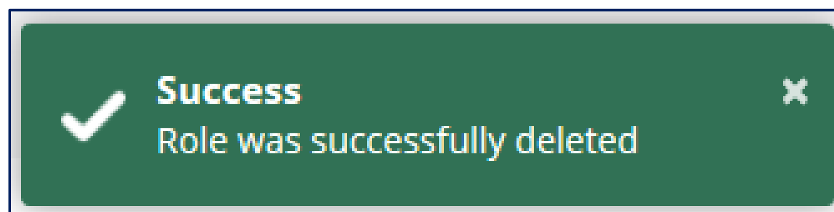
1. Scroll through the list of roles and find the role to be deleted
2. Click **DELETE** in the Actions column on the right-hand side of the screen of the appropriate role.



DELETING ROLES

3. The *Delete User Role* confirmation message displays.
4. Click **DELETE**. A successful confirmation message displays.

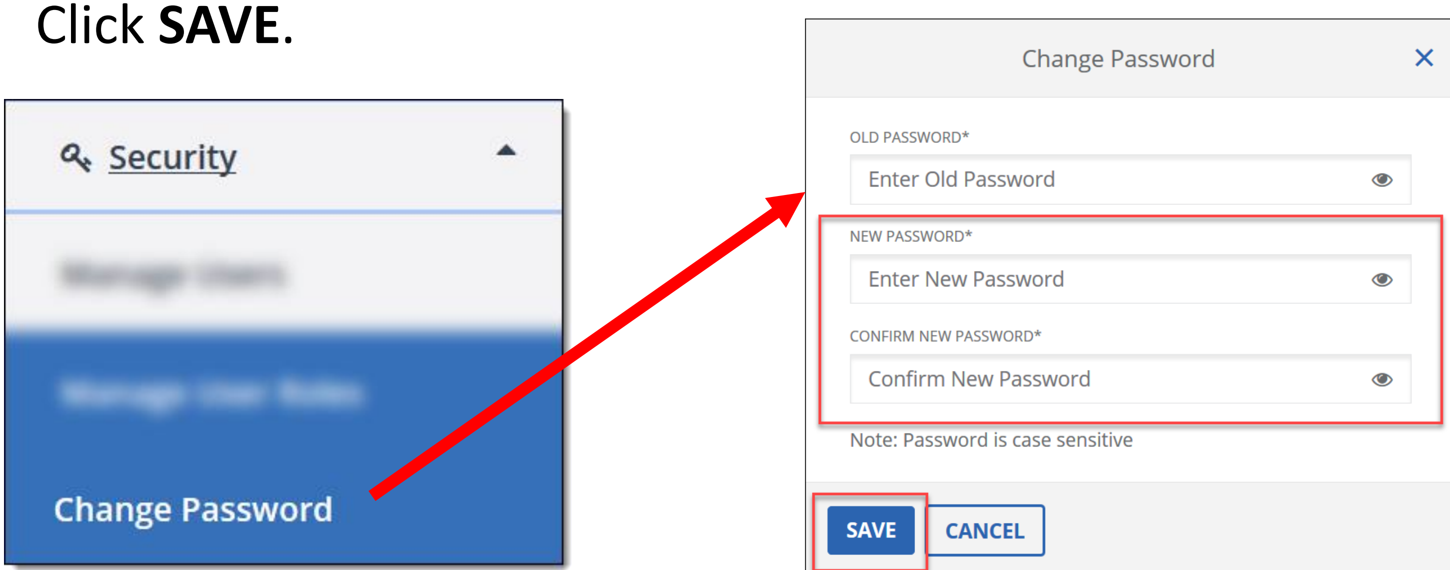




RESETTING YOUR OWN PASSWORD

RESETTING YOUR OWN PASSWORD

1. Click **Change Password** from the main **Security** menu. The Change Password panel opens.
2. Enter your current password in the **OLD PASSWORD** field.
3. Enter your new password in the **NEW PASSWORD** field; type it again in the **CONFIRM NEW PASSWORD** field.
4. Click **SAVE**.



QUESTIONS…